



Amherst Massachusetts

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To: Select Board

Fr: Paul Bockelman
Town Manager

Dt: July 14, 2017

Re: FY17 Town Manager Performance Goals – Annual Report

As I near the completion of my eleventh month as Town Manager for the Town of Amherst, I want to thank the members of the Select Board for the opportunity to serve in this incredible community. I have found the job to be challenging, rewarding, energizing, and very gratifying both professionally and personally.

I came to Amherst nearly one year ago because it was a community that was aligned with my values and offered the opportunity to work with talented, committed staff and officials. We, as a community, value participatory governance, open and transparent sharing of information, collaboration among interested groups, concern about social justice, and a commitment to professionalism in local government. I have built my career on these values and I am so pleased to have found a home with like-minded people working together to make Amherst a better place. And I am especially proud to be part of a group of talented staff and volunteers building on the legacy of strong managers to make Amherst a better place for all.

The Board and members of the community have warmly welcomed me and my family to Town. Last summer, before beginning my duties in the Town on August 22nd, I made five visits and met with over twenty-five members of the community including members of the Select Board and business community, neighborhood activists, current and former Town officials and staff, and members of the public.

These informal conversations gave me an insight into the work I would be doing and helped frame the basis for my entry plan. My personal entry plan was designed to help me learn the community, understand the people and politics, gauge the challenges, and develop a program that could be the basis for my work moving forward.

Once on the job, I devoted significant time to meeting with staff individually and in groups, connecting with members of the community, attending events such as the Block Party, farmers market, and school events, sports and plays, and just being in Town and introducing myself.

My entry plan and activities can be grouped into four general categories:

- A. Listening and developing an understanding of the Town;
- B. Learning and managing Town activities on a day-to-day basis;
- C. Addressing outstanding issues that had been awaiting a new Town Manager; and,
- D. Managing new challenges and crises.

I appreciate this opportunity to catalogue and report on the many things happening. It is helpful to both the Board and to me and the community to have a single document that identifies the many activities that we work on every day. It's a lot! The following list is by no means comprehensive.

This memo is intended to be a brief summary of the progress we have made to meet the performance goals articulated by the Select Board at its November 17, 2016 meeting. It will highlight the areas of progress and note the areas where work still needs to be done.

Please note clearly that every accomplishment in this report is the result of a team of staff members and volunteers who work together toward achieving an agreed upon goal. Many of the accomplishments are the end result of the vision of my predecessors and the fortitude of staff to continue to move the vision forward.

I. Fiscal Management

1. Address the need for increased revenue:

- CDBG funds: The Town continues to be designated a Mini-Entitlement recipient of Community Development Block Grant (CDBG) funds. This grant provides crucial funding for projects and activities that serve primarily low- and moderate-income members of the community. This year, in a process organized by the CDBG Advisory Committee with able guidance from staff, the Town will benefit from over \$700,000 in funds.
- CPA funds: The Community Preservation (CPA) Committee has recommended, and Town Meeting approved, funding for over \$1.5 million for community housing, open space, historic preservation, and recreation activities. Important in this year's budget is a small allotment of \$3,500 to offset administrative costs of this program.
- Potential New Development: The Board agreed to a tax-incentive with Beacon Communities to develop two new buildings containing 130 residential units - including 20% affordable units at 50% area median income, 22,000 square feet of non-residential space, approximately 304 parking spaces, and site improvements that include a village square, a play area and a dog park for residents in the North Amherst village area. It is projected that the total, ten-year value of the Affordable Housing Tax Incentive will be \$2,795,009. During that same period the development will add \$2,356,429 in new tax revenues for the Town from both

residential and non-residential space. Currently the site pays about \$10,000 per year in taxes.

- Economic development: The Town was designated a Community Compact Community by the Governor. As part of this designation, the Town was awarded a grant for \$25,000 for development of an economic development plan. This plan will be completed in FY18.
- Medical Marijuana: The Town has a host community agreement with one provider of medical marijuana. Staff and I have had numerous discussions with other providers who are interested in providing additional revenue to the Town through host community agreements.
- Public safety dispatch: Although this project has been reviewed on a regional basis in the past, there may be an opportunity to investigate a scaled-down version in the coming months. I am working with Scott Livingstone to see if this project can be advanced.
- MassWorks grant (current): The Town completed work on the \$1.5 million MassWorks infrastructure grant to bury 4,000 feet of electrical, cable and telephone wires on East Pleasant, North Pleasant, Triangle, and Pray Streets. The result is new construction but, more importantly, unlocking additional parcels that can be developed with careful planning.
- MassWorks grant (proposed): The Town is evaluating its readiness to seek MassWorks funding of approximately \$2 million to engineer and construct a new intersection in North Amherst that would bring Sunderland Road into Montague Road; to improve the traffic signalization at the intersection of North Pleasant, Meadow, and Pine Streets and Montague Road; and to install contiguous sidewalks along Montague Road connecting the newly created civic core with the major Mill Street recreation area and Beacon Communities development in the Mill District. If approved, this would unlock significant development opportunities within the North Amherst Village Center.
- Health insurance: I have taken aggressive measures to curb a negative cash flow trend in our Health Claims Trust. I have implemented a midyear 10% increase in the rates charged for both of the HMO and PPO health plans on October 1st. This builds on the 10% increase that was made on July 1st for the PPO plan. The additional contributions by the Towns of Amherst and Pelham, the Regional School District, and the employees and retirees who are receive coverage from the Trust will make a significant stride to stabilize the health insurance trust. The Insurance Advisory Committee and I will continue to work together to make changes to impact the costs of health insurance for the Trust's employees and retirees in both the near and long terms.

2. Long-term financial health:

- OPEB: We continue to make steady progress to address our "Other Post-Employment Benefits" (OPEB) liability by committing funds within the existing budget, from our enterprise funds, and earmarking Federal Medicare Part D reimbursements into the OPEB trust fund.
- Bond rating: While the Town's bond rating has not been reviewed since I started, there has been concern expressed concerning the impact of the Town being

designated a “Sanctuary City” by the Department of Homeland Security. After several exchanges with our bond advisors, it was determined that the existing status for the Town would not have an impact and there was no need for disclosure.

- Recreational marijuana: The passage of the recreational marijuana law in November increased the likelihood that companies will seek to establish stores in the Town. Under the leadership of two Select Board members supported by the Economic Development Director, Planning Director, and Health Director the Town has been active in understanding the legislation being proposed and educating others on the impacts on local communities. A recreational marijuana web page has been added to the Town’s website to assist the public in understanding the challenges and opportunities presented by the legalization of recreational marijuana.
- Health insurance: The long-term health of the Town is, in many respects, tied to the Town’s ability to manage its health insurance liabilities – present and future - successfully. As stated above, I have continued to monitor the condition of the Health Trust and have taken steps to stem the reduction of the Trust’s reserves. Longer term steps, which may include benefits, deductibles, co-pays and coverage need to be addressed by the Insurance Advisory Committee.
- Capital projects: One of my first tasks upon coming to the Town was to work with staff to develop a long-term strategy to meet the building needs expressed for a new co-located elementary school, a new relocated fire station, a new public works facility, and a renovated library. The co-interim finance directors and I were able to present a plan – built on the work of my predecessors – that utilized a combination of factors to make funding all four projects workable including debt that was reducing as bonds matured, increased commitment to capital over a multi-year period, increasing Free Cash to sustain the budget in peak times, and two strategic overrides. This plan was presented at the five boards meeting (Select Board, School Committee, Board of Library Trustees, Finance Committee, and DPW/Fire Station Study Committee) and showed a path forward that was manageable and reasonable. While the voters approved a debt exclusion override at the Town election and the MSBA committed upwards of \$34 million for a new co-located school, two Special Town Meetings decided against borrowing the funds. A referendum on the vote failed to reach the quantum necessary to borrow the funds on March 28th. With funding from Town Meeting, the School Committee is analyzing the Fort River School site. And, just this week, we learned that the library project was placed on the priority wait list for funding in future years. With this new information, we will be re-analyzing our situation and will present recommendations in the Fall.
- Operating budget: On October 13th, staff made a presentation to the Four Boards (Select Board, School Committee, Board of Library Trustees, and Finance Committee) that reviewed projected revenue and expenses for the Town and established a base for planning for the FY18 budget. This presentation served as the basis for the goals established by the Select Board and guidelines set by the Finance Committee. In a few months, we will repeat this process for FY19.

3. Budget Policy Guidelines:

- The budget presented to the Select Board on January 12th addressed the goals set by the Select Board and complied with the budget guidelines of the Finance Committee. The budget was subsequently reviewed in detail by the Finance Committee and, ultimately, approved with just one minor change by the Town Meeting.

4. Managing FY17 budget:

- The Town continues its prudent management of Town resources by monitoring and managing its FY17 approved budget. Results are reported to the Select Board on a quarterly basis. The Town concluded its fiscal year without any financial issues and no transfers required of the Finance Committee. And unspent budget amounts will contribute significant amounts to Free Cash for allocation to other uses in future years. We received a clean audit for FY16. Challenges, however, remain including the recent news concerning the Health Insurance Claims Trust Fund needing additional funds to maintain its reserves. I anticipate that this fiscal challenge will be addressed without requesting an additional appropriation from Town Meeting. A full report on the end of the fiscal year and the status of the Health Claims Trust Fund will be made to the Select Board at an upcoming meeting. The Board may wish to call a meeting of the Budget Coordinating Group to share this information more broadly.

II. Relationship with the Select Board

1. Communications:

- The importance of communication cannot be overstated. To ensure there is adequate and thorough communication, we have established the following methods of communication:
- Weekly meetings with the chair and vice chair to set the next meeting agenda;
- Weekly meetings with the chair to review other, non-agenda topics;
- Regular communication that does not violate the Open Meeting Law via email with all members of the Board to update members on emergencies and special events such as the most recent activities in March and the Crocker Farm School fire in July, etc.

2. Board correspondence:

- I held meetings with individual Board members in December – my three-month mark – to check in with Board members to gauge if the level of correspondence was appropriate. I have reached out to the individual Board members to do a similar set of meetings at the conclusion of my first year on the job.
- Board members know that I have an open door/email/telephone policy.

3. Emerging issues:

- Water Crisis: The severe, multi-year drought created very high concern among our institutional partners. The Assistant Town Manager led a process that was

inclusive, informative, and yielded dividends of improved communication and better coordination of emergency management services. This effort led to a better understanding of the Town's water system by our institutional partners and a much-deserved increased respect for the professionals in our Department of Public Works managing the Town's water supply. Due to ample rain this Spring and Summer and reduced water usage, there has been no need to activate this group this year.

- Sanctuary Communities: The newly elected president of the United States of America promulgated rulings that raised intense anxiety among members of our community, especially those who are immigrants. I, along with the Chief of Police and Superintendent of Schools, issued a declaration on behalf of the Town to state clearly the Town's position on the issue. I have worked with members of the Select Board, public safety officials, and advocates in the community to craft an appropriate response by the Town. Town Meeting passed a Sanctuary Communities bylaw which is being reviewed by the Massachusetts Attorney General. The Attorney General is reviewing the bylaw now.
- Flag Misconceptions: News reports falsely reported that the Town does not fly the flag of the United States of America. This was and is not true. The issue was merged with the flag controversy at Hampshire College and there was a fair amount of navigating around the issue with the press and public.
- Comcast Contract: The contract between the Town and Comcast, with the important involvement of members of the Select Board, was resolved with an agreement that is widely seen as one of the best in the state for communities.
- PEG Access Funding: Changing state recommendations required the Town to prepare to reclassify funds coming into the Town for PEG access and, in turn, required the Town to seek options for distributing the money. This caused extensive concerns among supporters of Amherst Media. Ultimately, the issue was resolved when the Department of Revenue and the Inspector General's offices delayed and rescinded their initial rulings.
- Amherst Media Contract: The Town's team of negotiators which includes two members of the Select Board, the I.T. Director, Comptroller and the Town Manager has been working diligently with the negotiating team from Amherst Media to develop a successor agreement to the current contract. The current contract has been extended twice, first to June 30th and second to September 30th, as the two parties continue to work in good faith to an agreement that is acceptable to both parties.
- Recreational Marijuana: The passage of the referendum on the state-wide ballot in November created much uncertainty in the discussion about the legalization of recreational marijuana. It also impacted developments in the medical marijuana contractors. A team which includes two Select Board members, the economic development director, health director, planning director and Town Manager has been meeting every other week to develop the priorities for the Town and to monitor the development of legislation in response to the ballot initiative passed by the voters in November.
- Homeless Shelter: Detailed discussions were had with the organization operating the homeless shelter to ensure that there was predictability in the housing for

those experiencing homelessness. My visit this Winter supported the impression I had that they do good, responsible work. Our communications made us a valued ally when the organization's funding was in jeopardy. Funding was restored ensuring the availability of the shelter during the entire winter season. The good management of the shelter along with strong partnerships with the police and fire departments has improved communication and minimized the conflicts at the shelter. We are scheduled to meet in two weeks to review the prior year and prepare for the coming year.

- Tax Incentive for Affordable Housing: We reviewed the Affordable Housing Tax Incentive which was approved by Town Meeting in 2015. It took extensive work to take the legislative language and interpret it into a usable tool to promote affordable housing. A successful review with the assistance of a consultant, the Principal Assessor, and Assistant Town Manager generated a new model for utilizing this powerful tax tool. The tax incentive was approved by the Select Board and is now available to support the funding requests by the developer as the Town's financial contribution to creating important deeply subsidized affordable housing.

4. Policy

- Ample discussion is afforded members of the Board, both in one-on-one communication with the Manager and in public settings, before public policy is set.

5. Collective Bargaining

- 5 of 6 collective bargaining agreements are settled through 6/30/19, including the Police Supervisors Contract ratified last December. One contract is outstanding and talks continue with this union.
- Non-union and part time wage schedules are being maintained with a goal of parity with union contracts.

6. Litigation

- Litigation update was delivered to the Board at its March 6th meeting.

7. Media

- Standard practice is that anything of consequence from the Town Manager's office gets copied to the Board in advance.
- I conduct weekly meetings with the two main members of the media and respond as needed to requests from other media including three television stations and two radio stations.
- I participated in an excellent hour on WHMP's Morning News.
- I participated in a podcast on capital projects hosted by Oliver Broudy called "Let's Be Reasonable".
- I have increased town exposure on social media with more robust use of Twitter and increased use of the Town's Facebook page.

III. Long Range Planning

1. Continuing to revise and update the 07-16-16 Facilities Profiles:
 - Due to the extended absence of the Town and School's Director of Facilities and Maintenance, this project has been delayed.
2. Town property:
 - We are preparing to address the request for a property disposition policy at one of the Board's meetings in August.
3. Sustainability and Green Initiatives:
 - Discussions to build solar on the landfill continue. Difficulties emerged when the solar provider declared bankruptcy. Alternatives are being sought.
 - Additional solar installations are under consideration on private land. The Town would seek a PILOT payment as used in previous projects.
 - A \$50,000 grant to hire a staff person for solid waste has been awarded and the position advertised. The position will be filled once a contract with the State is completed.
 - The Town's new plastic bag ban bylaw took effect on January 1st. Extensive work was done by the health director and economic development director to ensure implementation of the ban was successful with special outreach to the business community. Our experiences indicate some tweaking of the bylaw may be in order.
 - Two living buildings were dedicated in the last six months. Both are on the campus of Hampshire College. One is the R.W.Kern Center at Hampshire College. The other is the Hitchcock Center. Hosting two of these rare buildings is a true achievement for the community. These buildings seek to attain the highest standard for sustainability in the built environment. Net zero energy through onsite renewable energy and energy efficient design strategies and net zero water through onsite rainwater recapture and reuse system and composting toilets. It will take over a year to determine if these buildings meet the living building challenge. Only ten in the world have met this challenge to date. The builder of the site and president of Hampshire College have repeatedly recognized the work of our Town employees, especially in inspection services and public works, for their professionalism and positive attitude in reviewing new technologies and concepts.
 - The Town utilizes Town-owned electric vehicles, including a new school bus, which were purchased with grants.
 - The Town continues its effort to green the environment by working toward planting 2,000 trees over three years.
4. Affordable housing:
 - The aforementioned Beacon Communities development in North Amherst will contribute significantly to the Town's stock of housing that is permanently affordable, adding 26 deeply affordable units to the Town. The Board made use of the affordable housing tax incentive to support the development of the Beacon

Communities development in North Amherst. Extensive work went into understanding how to enact this particular incentive.

- The Town made a significant investment of public funds and staff and board commitment to the development of two Habitat for Humanity homes on East Pleasant Street and two on North Pleasant Street.
- Staff negotiated a working agreement with Craig's Doors shelter for homeless individuals that set the ground rules for accommodating those in need without resulting in daily or weekly appeals for additional beds.
- The Town assisted Craig's Doors in lobbying the Legislature to secure release of the \$200,000 appropriation needed to operate the shelter through the winter.
- I have regularly assembled staff from police, fire, health, planning, building, and public works who are involved with addressing challenges of working with the members of our community who are homeless. There are also monthly meetings with service providers to review issues that arise. The Town has been proactive in utilizing police officers to address many of the issues in the downtown area.

5. Staffing:

- Eighteen individuals have left the employ of the Town since July 1, 2016 (fourteen during my term as Town Manager). Twenty-seven individual have been hired since July 1, 2016 (twenty-two during my term). Significantly, this list includes six patrol officers and four firefighter/paramedics – all filling existing vacancies from prior years – and one town manager.
- Staffing vacancies are being examined to ensure the positions being filled are actually needed. I also instituted a policy that requires the Town Manager to interview the recommend candidate before an appointment is made. This ensures clear lines of authority and a final quality check on the new hires. Hiring is one of the most consequential financial decisions made by the Town Manager.
- The fire staffing study is nearing completion. Extensive delays followed by reviews by Town staff, fire staff, and fire union representatives have strengthened the report as it moves into its final form. Formal presentation to the Select Board should occur in a matter of weeks.

6. Improving public infrastructure and spaces:

- I established a Dog Park Task Force whose charge is to explore the possibilities of developing one or more dog parks in the Town. This will include sites, management, funding, etc.
- The Wayfinding Signs project has made significant progress with the design and family of signs being presented and agreed upon. This is a long-standing project and need identified by the business community.
- Additional funds are being dedicated to paving or repairing public roads and sidewalks. This work will supplement the money already dedicated through Chapter 90.
- Town Meeting has appropriated funds to rehabilitate Groff Park and the North Common. Detailed planning for these projects, including plans for public involvement, will be initiated in coming weeks. These projects are major

initiatives for capital investment and will make a significant new addition to our public outdoor spaces.

- The Downtown Parking Working Group has developed important proposals to address the parking needs of downtown. The Board will review these proposals on Monday.
- The Amity Street parking lot and crosswalk and pavement have received high praise.
- Work continues on addressing the North Pleasant, Pine, Meadow Street intersection and traffic planning in the North Amherst area. The Town will submit an application for a MassWorks grant to undertake the engineering and construction of this project.
- The construction of a new roundabout at the intersection of East Pleasant and Triangle Streets continues. Utilities have been placed underground, new water/sewer lines are installed as necessary, and the construction of the roundabout and final paving has begun with a goal of being largely complete by Labor Day.

7. Fee subsidies for LSSE:

- Funds for subsidies as approved by Town Meeting in 2015 are in the FY17 budget and again included in the FY18 budget.
- Additional funds for community services were appropriated at the Annual Town Meeting for the FY18 budget. Staff is now preparing options for how to allocate these funds.
- The Select Board committed to having a broader policy discussion and address the larger policy discussion concerning the level of commitment the Town makes to social services which will be held in September.

8. I-Net replacement:

- We did not succeed with our grant application to fund the I-Net through the Community Compact. Funding this important project is now part of the discussions with Amherst Media and the capital provided by Comcast. We have established a timeline for when Comcast intends to abandon its support and maintenance of the I-Net.

IV. Staff and Personnel Relations

1. Staff Morale:

I have worked hard to improve staff morale, communicating with all staff in a variety of ways and valuing their important work. In addition to normal, everyday staff interactions with members of the staff throughout the organization, I have worked to improve morale in the following ways:

- I have worked with our department heads and leadership team to develop better effective relationships with all staff in the Town. I have modeled good staff relations and encouraged department heads along these same lines.
- I have met with groups of employees in large and small settings such as:
 - Most staff at the Town's annual picnic and annual holiday party;

- Town Hall including numerous social settings and regular day-to-day contact, and the annual non-union employee group meeting with the Personnel Board;
- Public Works including an all DPW staff meeting at the beginning of my tenure, tours of DPW facilities, visiting the DPW during snow storms and conducting a “ride-along” during the recent snow storm;
- Water including touring the facilities at the beginning of my tenure;
- Sewer including touring the facility at the beginning of my tenure and visiting the plant on Thanksgiving;
- Police including being on the street during Halloween weekend, visiting the Communications Center several times, visiting the site of the homicide, being part of the Emergency Operations Center at UMass on Super Bowl Sunday and that special weekend in March and being part of the Emergency Operations Center at the APD on that same special weekend;
- Fire including several visits to both the Central Station and North Station on Thanksgiving, participating in the open house at the Central Station and the Pancake Breakfast at the North Station, and observing the Department’s work during two working fires;
- Library including comprehensive tours of the Jones Library and the branches;
- Bangs Center including attending several meetings of the Council on Aging, a retirement party and the Senior Center’s holiday party.
- I hold regular, quarterly open all staff meetings at Town Hall.
- I will be initiating more direct feedback opportunities for all staff.
- The Human Resources staff has put on several trainings – including an intensive training in the event of an active shooter – that have received very high marks from Town employees.
- I have begun a news notes email newsletter to all staff to update staff on comings and goings and significant issues facing the Town. This should become a more regular occurrence.
- With the Board’s concurrence, we have used the high profile Select Board meeting venue to welcome new police officers and firefighters and recognize staff for special performance. This is highly valued by the employees.

2. Departmental communication:

- The Superintendent of Schools and I meet regularly and communicate with each other daily. Communication on areas of shared interest is excellent.
 - In particular, the Town has worked extremely well with School staff during emergencies such as the cooperation during the discovery of lead in the water at our schools which involved district leadership, building leadership, facilities personnel, DPW experts, and the director of public health.
 - Another example is the recent fire response to Crocker Farm School on Friday night where school personnel, the assistant town manager, building

department inspectors, and firefighters all worked to resolve an issue in time for school to reopen on Monday morning.

- The Superintendent and new Assistant Superintendent attended one of my department head meetings where he updated staff on the status of school building projects.
- The Superintendent and I will be hosting a team-building event for department heads in both organizations during August. The purpose is to enhance communication among staff throughout the organization.
- I hold regular, quarterly meetings of all department heads.
- I hold regular, monthly meetings of the leadership team.
- I hold weekly, bi-weekly, or monthly meetings with the Police Chief, Fire Chief, Superintendent of Schools, Library Director, Economic Development Director, Superintendent of Public Works, Assistant Town Manager, Human Resources Director, Senior Services Director, Town Clerk, Treasurer/Collector, Comptroller, Interim Director of LSSE, and Assistant to the Town Manager.
- We hold monthly meetings to discuss economic development issues in the Town which brings together planning, building, and economic development staff.
- I attend quarterly economic development meetings that was initiated by former Rep. Ellen Story.
- I continue to serve on the Business Improvement District Board of Directors and attend monthly meetings.

3. Recruiting staff:

- I continue to work with our Human Resources department to ensure that the Town is seen as an “employer of choice” in western Massachusetts. We have seen numerous wins in our successful recruitment of talented staff such as a new sports director, IT applications manager, senior center social worker, DPW employees, human resources staff, paramedic/firefighters, and police officers.
- A sign of a healthy and satisfied workforce is one in which current employees are competitively positioned to successfully vie for promotional opportunities. During my tenure this has occurred in DPW, Fire, Police, IT, the Senior Center and Leisure Services.

4. Customer service:

- I have reopened Town Hall to the general public on Thursday mornings. While this presents certain challenges to our staff, I have established that the Town’s priority is to serve the public.
- The Town has established a high bar for excellent customer service and I continue to work with staff to ensure that all requests and visits from the public are handled expeditiously, thoroughly, and professionally.
- The implementation of Early Voting at UMass is one example where extensive outreach and staff resources were put in place to ensure the successful implementation of this new law during an election with high turnout.
- I worked with the Police Chief with the support of the Human Rights Commission and School Superintendent to address a potentially difficult

situation. The Police Chief and I issued a joint statement that identified the issues and ways to address them.

5. Service delivery:

- Good customer service and service delivery is a theme that I review regularly with staff during staff meetings. Special focus has been placed in my conversations with DPW employees whose work is highly visible and subject to critique, simply due to the high visibility of their jobs.

6. Staff support:

- Retaining excellent staff is also a high priority which I continue to emphasize throughout the organization. Retaining high performing members of the organization requires the supervisor to provide guidance, mentoring, and ample professional development opportunities. I have worked to cement these values in our supervisors.
- Succession planning is another key conversation that I have with department heads.
- Individually, I have worked directly with the Economic Development Director, a significant new post for the Town, to refine his role with the business community and neighborhoods; encouraging him to take the lead on both medical and adult-use marijuana and on the gas moratorium where he was certified as an expert witness, and with his appointment to the Policy Committee on Municipal and Regional Administration at the Massachusetts Municipal Association.
- I am pleased that the Superintendent of Public works was appointed to the Massachusetts Municipal Association's Policy Committee on Energy and the Environment.
- I have been encouraging department heads to review the professional development opportunities available to their staff. One such opportunity is the MMA-Suffolk University Certificate in Leadership and Management program. I am very pleased that Treasurer/Collector Clair McGinnis was admitted into this rigorous program. It begins in September.
- Outreach to the community (Town Hall Road Show and Cuppa Joe with Paul) are dependent on staff support in planning, promoting, and delivering information.

7. H.R Audit:

- Human Resources practices and procedures are being continually reviewed and updated, in consultation with the Director, employee groups and the Personnel Board. The Personnel Board and a self-appointed non-union team have been reviewing and updating the Personnel Procedures Manual (last updated in 2012) with the goal of bringing it to the Town Manager and, where needed, the Select Board his fall.

V. Community, Intergovernmental Relations, and Volunteer Committees, Boards, and Commissions

1. Institutional partners:

- I have met regularly with the Chancellor of UMass and engaged in productive discussions with the presidents of Amherst and Hampshire Colleges.
- We have developed superb communication lines between staff and the University and meet frequently to discuss areas of mutual concern. We owe a debt of gratitude to our University and college partners for their sharing of communication and concern about the Town as a whole. I maintain regular contact in various settings with key contacts in all of the institutions which facilitates communication
- The water crisis had the positive side effect of enabling the Town and our institutional partners to work together toward a common goal. The increased and regular communications has strengthened already strong bonds among the four players.
- UTAC has proposed a new organizational structure which was discussed after a UTAC retreat. This will be discussed with the Board at an upcoming meeting.
- Preparations for the unnamed March event were done very well with extensive planning, programming and communication between the Town and the University.

2. Campus and neighboring communities developments:

- Improved communication among our institutional partners has enabled the Town to not be surprised by developments such as the University's RFI.
- Discussions are just beginning concerning the delivery of ambulance services to the Town of Hadley.
- Discussions are in the very preliminary stages about sharing emergency dispatch services with other communities.

3. Public Relations:

- I hold weekly press briefings with members of the media and provide them with information on ongoing or upcoming issues.
- I have established a Twitter feed for the Amherst Town Manager that has 183 regular followers, a 35% increase since my six-month review. That's good, but not nearly enough.
- We have expanded outreach with a more aggressive social media policy and developing content that can be delivered to our constituents and the press in a format that they are more likely to read.
- I have held four regular coffees with the public on a monthly basis. These coffees provide an opportunity for the public to meet with me and department heads in an informal venue located closer to where people live. To date I have held the following coffees: April: Chief Livingstone at Black Sheep; May: Assistant Town Manager Ziomek at Atkins in South Amherst; June: Planning Director Brestrup at Bread and Butter in North Amherst; July: Superintendent of Public Works Mooring at Bruegger's.

- I also initiated a series of open forums – we call it “Town Hall Road Show” - where department heads and I present developing issues – or just common complaints – in a larger group setting. We held sessions at the Crocker Farm School for South Amherst and at the UMass Police Station for North Amherst.
- Communications with the BID and Chamber continue to be a high priority with ongoing communications concerning signage, public safety, etc.

4. Customer service: see above

5. Committee support:

- I have attended numerous meetings of the various committees in the Town from A (Assessors) to Z (Zoning Board of Appeals...and almost every board or committee in between. I have more to meet and will continue with this approach until I have attended every committee or board. My message is simple: I introduce myself, give a brief description of who I am and what I value, thank them for their time and their work, and encourage them to reach out to me individually if I can be of assistance to them.
- In the next six months, I will be reaching out to the chairs of each of the committees to ascertain whether they have direct staff support, the quality of the staff support they receive, the amount of time they receive from staff, and how I can assist them in meeting the mission of their committee.
- I also have regular conversations with several chairs and listen and offer suggestions, if necessary.
- I have met individually with members of the Charter Commission to address specific technical questions and concerns that have arisen in the charter review process and have facilitated access to Town Counsel to ensure their work product meets legal requirements.

6. Committee management:

- One of the challenges that we have not addressed adequately is ensuring that minutes, especially for the Select Board, are prepared in a timely fashion. There are two challenges that must be addressed at the same time. One is to put in place a system so that minutes for Board meetings can be presented to the Board for review in a timely manner. The other addressing the backlog of minutes from over a year ago. For the first, I am investigating staff options to have a staff member dedicated to taking minutes for the Board’s meetings. For the second, I have carved out time from the Assistant to the Town Manager’s schedule to make progress in the backlog of minutes.
- I hope that the new software, Acella, will provide the technological support needed to manage and prepare minutes in a more expedited manner.

VI. Specific Accomplishments and Upcoming Challenges

Specific Accomplishments:

- Delivered balanced budget which was approved by the Select Board, Finance Committee and Town Meeting.
- Provided outline for funding four capital projects.

- Introduced new outreach to the community including “Cuppa Joe with Paul”, “Town Hall Road Show”, and enhanced presence on social media.
- Developed framework for utilizing affordable housing tax incentive for Beacon Communities for its development, North Point at the Mill District.
- Successfully managed water restrictions for residents and institutional partners.
- Concluded negotiations with Comcast for ten-year license renewal and nearing conclusion for a contract with Amherst Media for PEG services.
- Worked with staff and elected and appointed officials to initiate discussion of the downtown.
- Managed several staff transitions in key departments including LSSE and community services.
- Worked through numerous legal issues with regard to the School building project including debt exclusion, two town meetings, and referendum vote.

Upcoming challenges:

- FY19 Budget: work with Select Board, Finance Committee, and staff to develop FY19 budget based on guidelines enunciated by the elected and appointed officials.
- Health Claims Trust Fund: work to ameliorate challenges to the Fund.
- Downtown planning: continue working with stakeholders to develop shared ideas for the downtown area.
- Wayfinding signs: complete the design, location, and funding plan for this project.
- Paving and management: establish roads and sidewalks as high priorities with additional funds devoted to this important need, including pursuing Complete Streets certification.
- Sustainability: develop a strategy that will continue and enlarge the Town’s focus on green initiatives including proposals for solar and solid waste.
- Finance director: settle on the appropriate position needs and title prior to setting the FY19 budget.
- Fire staffing study: conclude fire staffing study, review recommendations, and develop a strategy moving forward.